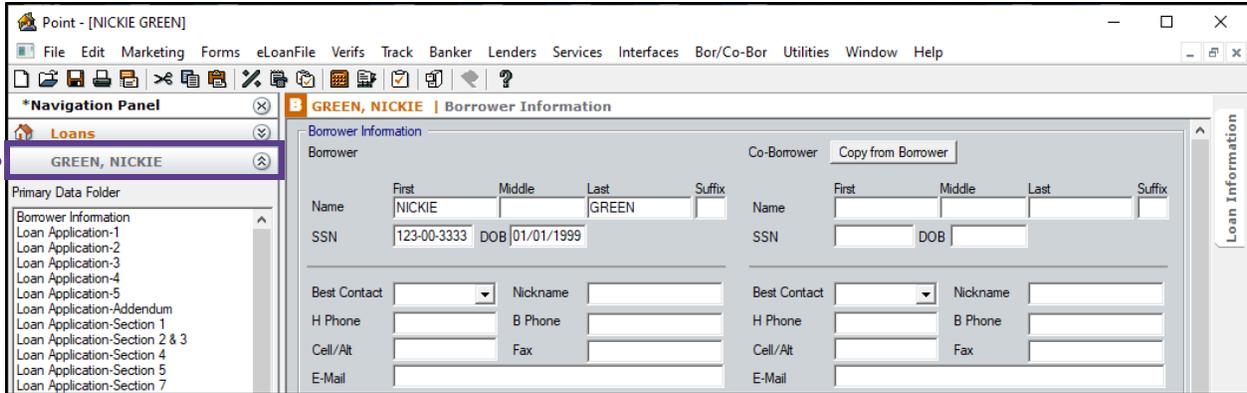
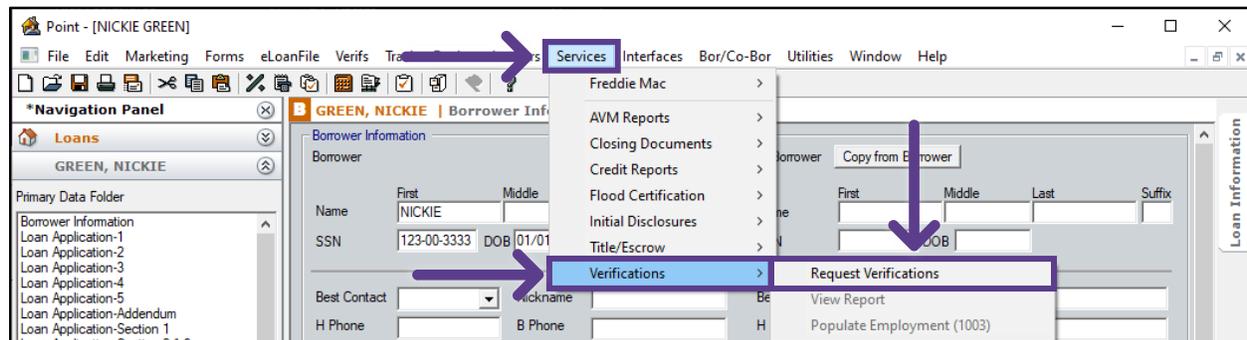


1. Start by logging in and opening the applicants loan file.



2. Click on the Services drop-down menu and navigate to Verifications, then click Request Verifications.



3. Select the Verification Services Provider. Then select the Request and Verification type:
 - Request Type – Select Borrower: toggle between borrower and co-borrower if joint
 - Verification Type – Check the box for the request needed and choose the years from the dropdown list. Only one order can be placed at a time.
 - Authorization Method – Browse and upload the 4506C.
 When all information is entered correctly, please click Submit.

Request Verifications

Verification Services Provider: Xactus IRS-Direct 800-243-0120 [Getting Started](#)

Generic Verification Request

Order

- Order New Verification
- Upgrade Order
- Check Status

Primary Borrower Order Reference Number: _____

Co-Borrower Order Reference Number: _____

Additional Instructions, Comments

Request Type

Select Borrower

- NICKIE GREEN
- [No Co-Borrower Name]

SSN: 123-00-3333 SSN: _____

DOB: 01/01/1999 DOB: _____

Verification Type:

- Return Transcript (1040a) 2018, 2019, 2020, 2021
- Return Transcript (1040b) 2018, 2019, 2020, 2021
- Return Transcript (1040c) 2018, 2019, 2020, 2021
- Personal (W2/1099) W2 - 2018, 2019, 2020, 2021
- Business (1065/1120) 1065a - 2018, 2019, 2020, 2021
- E-Signature _____

Authorization Method: Document Attached

Users\mwwitt\Desktop\TEST\4506-C.pdf

Press F1 for help

Input the user ID and password for your selected credit agency, then click OK

Xactus IRS-Direct Login

Account #: _____

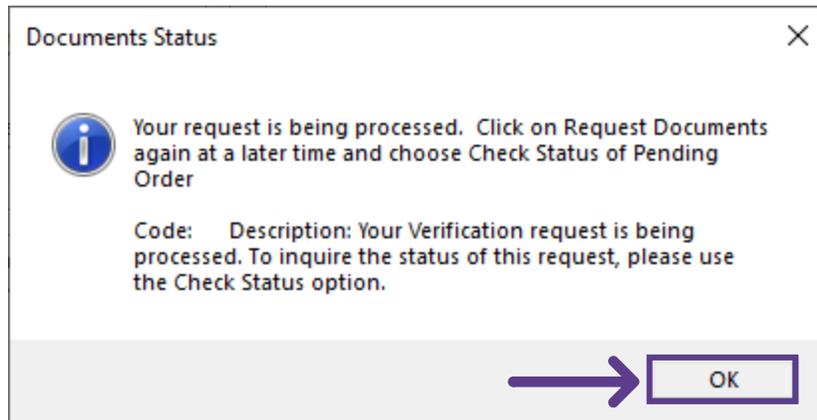
User ID: mwwitt

Password: _____

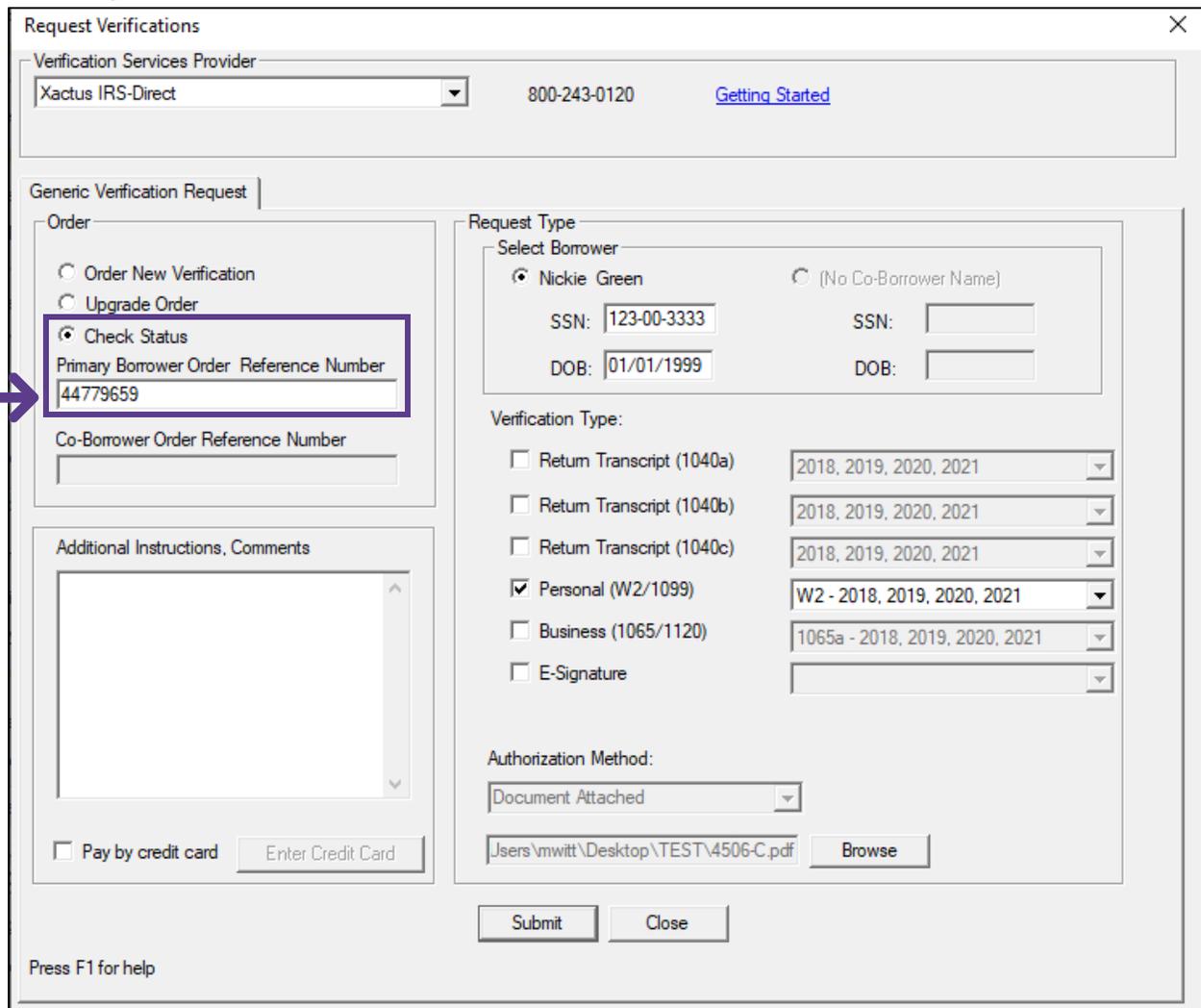
Save Password

Need Help?
Xactus IRS-Direct
800-243-0120
[Getting Started](#)

4. The following will appear letting you know the order is being processed. Click OK.



5. You will be taken back to the Request Verifications screen where you can check the status of the order or request additional Verifications. Also notice that the primary borrower is also assigned a Reference number (Report ID) for the current order.



The "Request Verifications" screen is shown. At the top, it displays "Verification Services Provider" as "Xactus IRS-Direct" with a phone number "800-243-0120" and a link "Getting Started". Below this is a section for "Generic Verification Request" with two tabs: "Order" and "Request Type".

The "Order" tab is active and contains:

- Radio buttons for "Order New Verification", "Upgrade Order", and "Check Status" (which is selected).
- A text field for "Primary Borrower Order Reference Number" containing "44779659".
- A text field for "Co-Borrower Order Reference Number" which is empty.
- A text area for "Additional Instructions, Comments" which is empty.
- A checkbox for "Pay by credit card" and a button "Enter Credit Card".

The "Request Type" tab contains:

- "Select Borrower" section with radio buttons for "Nickie Green" (selected) and "[No Co-Borrower Name]".
- Fields for "SSN" (123-00-3333) and "DOB" (01/01/1999).
- "Verification Type" section with checkboxes and dropdown menus for "Return Transcript (1040a)", "Return Transcript (1040b)", "Return Transcript (1040c)", "Personal (W2/1099)", "Business (1065/1120)", and "E-Signature".
- "Authorization Method" section with a dropdown menu set to "Document Attached" and a "Browse" button next to a file path "Users\mwitt\Desktop\TEST\4506-C.pdf".

At the bottom of the screen are "Submit" and "Close" buttons. A footer note says "Press F1 for help".

PLEASE LET US KNOW IF YOU HAVE ANY QUESTIONS OR CONCERNS AND WE WILL BE HAPPY TO HELP.